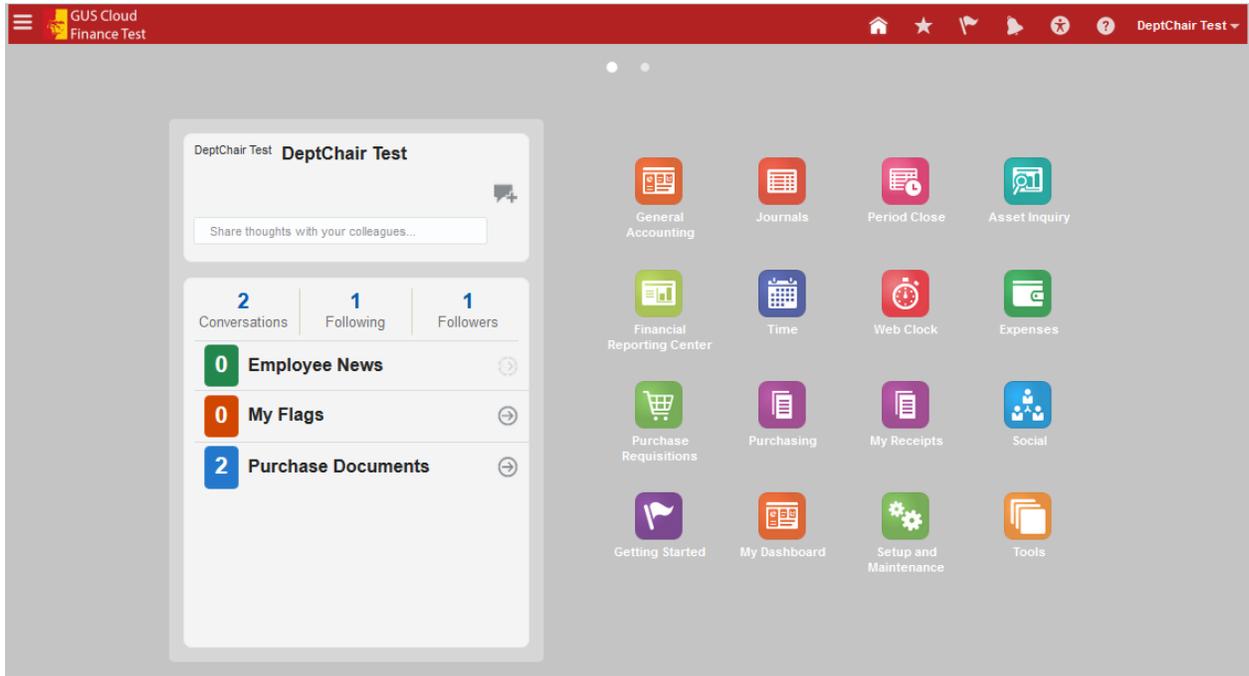


# Job Aid

## Managing Delegates-Expenses



This Job Aid walks through the process of granting permission to enter and manage your expense reports to another individual. For instructions on how to view who has granted you permission to enter and manage their expense reports, see the 'Viewing Delegate Permissions-Expenses' Job Aid.

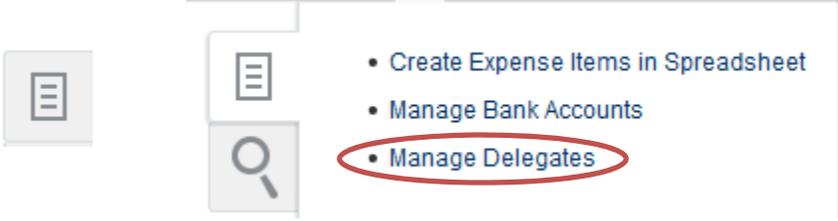
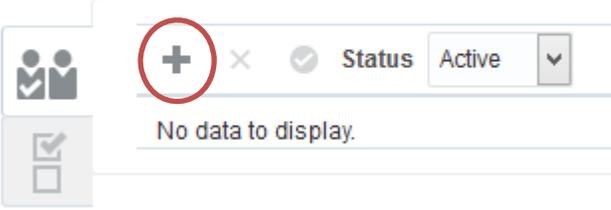
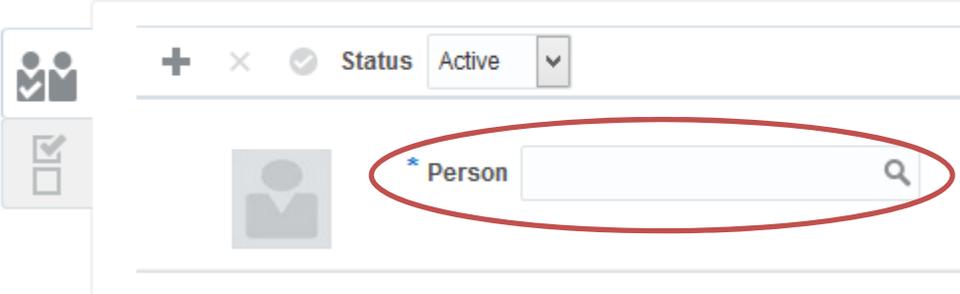


Step	Action
1.	Click the <b>Home</b> icon at the top right of the screen to access the <b>Gus Cloud Springboard</b> . 
2.	Click the <b>Expenses</b> icon on the home page to access the <b>Expenses module</b> . 

# Job Aid

## Managing Delegates-Expenses

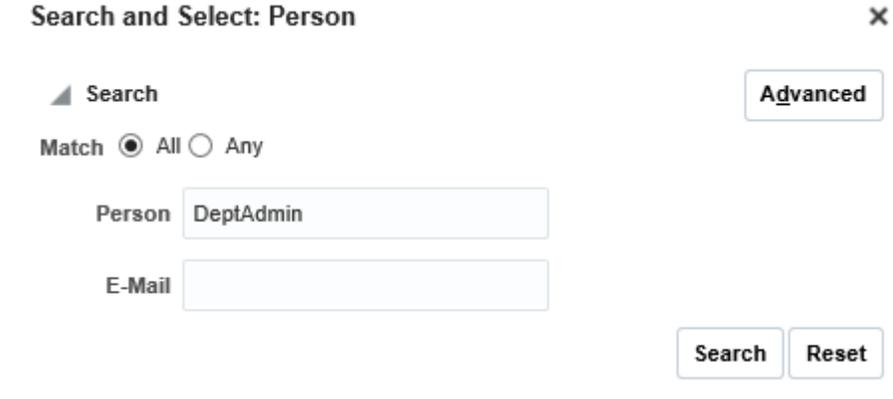
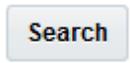
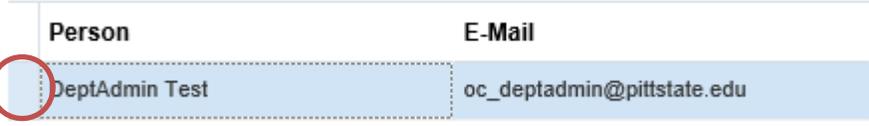
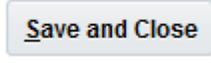


Step	Action
3.	<p>Click <b>Tasks</b>, then <b>Manage Delegates</b></p>  <p>The screenshot shows a 'Tasks' menu with three items: 'Create Expense Items in Spreadsheet', 'Manage Bank Accounts', and 'Manage Delegates'. The 'Manage Delegates' item is circled in red.</p>
4.	<p>Click the '+' icon located under <b>Delegates and Permissions</b>.</p>  <p>The screenshot shows the 'Delegates and Permissions' section. It has a header with a '+' icon circled in red, a 'Status' dropdown set to 'Active', and a message that says 'No data to display'.</p>
5.	<p>Search for the person you wish to delegate your expense entry to. To search for a person, either type a name in the text field under * <b>Person</b> or select the magnifying glass icon.</p>  <p>The screenshot shows the 'Delegates and Permissions' section with a search field labeled '* Person' circled in red. The search field contains a magnifying glass icon.</p>

# Job Aid

## Managing Delegates-Expenses



Step	Action
6.	<p>After selecting the magnifying glass icon, type the name of the Delegate in the <b>Person</b> field in the dialogue box.</p> 
7.	<p>Click <b>Search</b>.</p> 
8.	<p>Select the <b>Person</b> by clicking the space to the left of the person's name.</p> <p>This will highlight the row.</p> 
9.	<p>Click <b>OK</b>.</p> 
10.	<p>Click the <b>+</b> icon to continue adding Delegates, clicking 'Save' periodically to save your work.</p>
11.	<p>To inactivate a Delegate, select a name and click the <b>×</b> icon.</p>
12.	<p>To reactivate a Delegate, select a name and click the <b>☑</b> icon.</p>
13.	<p>When the desired Delegates are active and/or inactive, click 'Save and Close'.</p> 
14.	<p>You have reached the end of the Managing Delegates for Expenses Job Aid.</p>